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IRS Hot Topics for Tax Professionals

45th Annual Delaware Federal & State Tax Institutes
December 7, 2021



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Quick Security Tips from the IRS

**Beware phishing scams, especially
COVID and stimulus-related
schemes**



Cybercriminal Threats

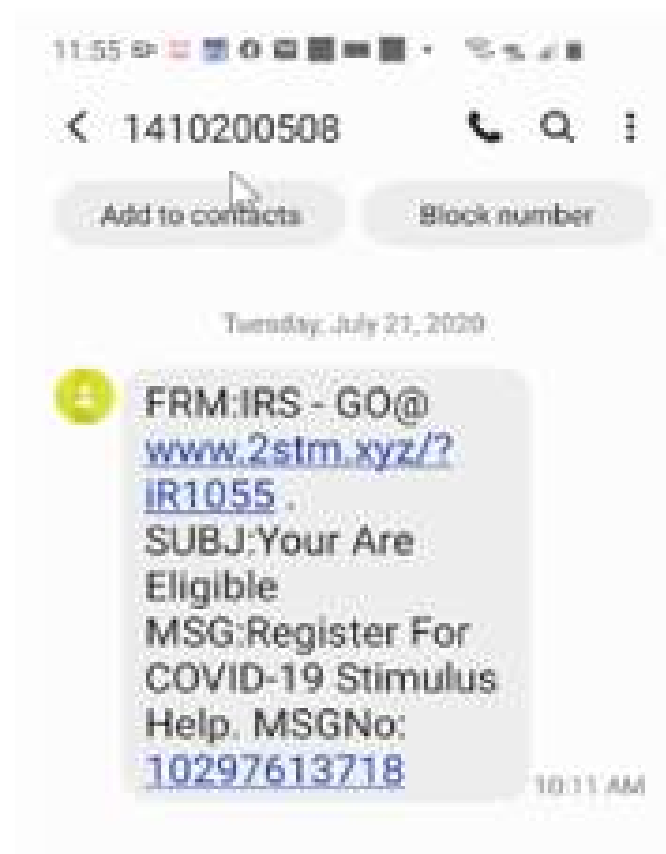
- **Cybercriminals have attempted to exploit COVID-19 concerns this year**
- **Cybercriminals use a variety of techniques and tools**



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Short Message Service – Example

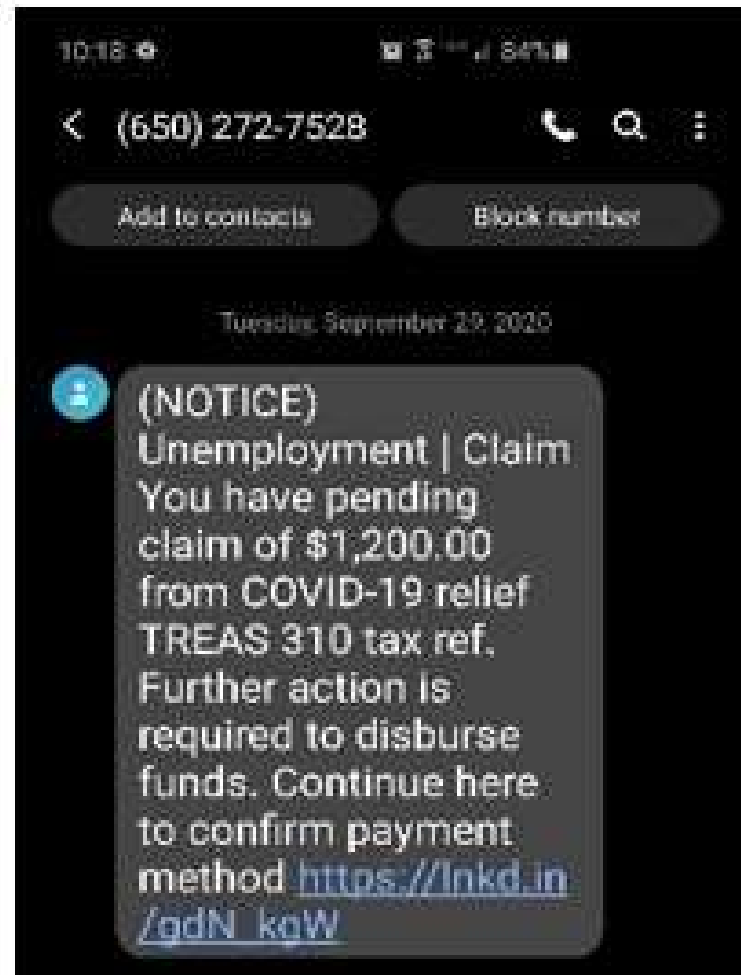




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Phishing Text Message – Example

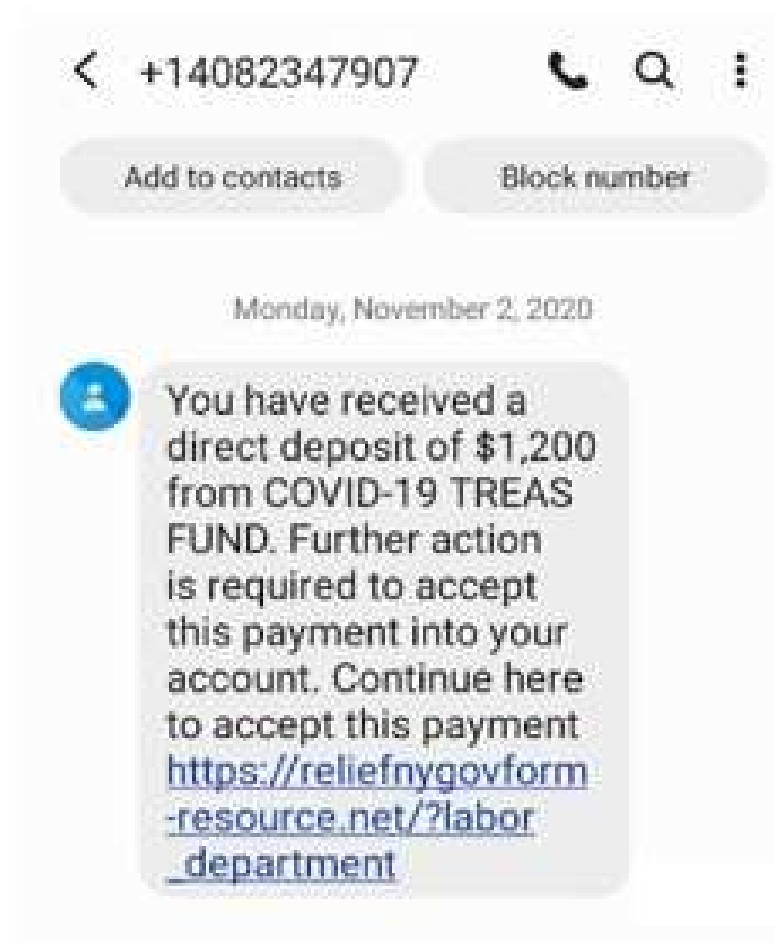




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Phishing Text Message – Example 2





COVID 19 Scams

- **Cybercriminals have attempted to exploit COVID-19 concerns this year by using it as their “bait” in phishing scams**
- **Cybercriminals pose as government agencies with “urgent” messages promising help**



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Phishing Email – Example

Subject: 2020 tax season inquiry
Date: [REMOVED] 2020 [REMOVED]
From: [REMOVED]
To: [REMOVED]

Happy New year,

I am currently in **search for a new tax preparer**. I usually file these federal forms 1040, Schedule A, Schedule B, Schedule C, Schedule D, Schedule SE. My former preparer typically charged around **\$600**. Is that the typical fee that you would charge? I talked to a large tax group in the area, and they said that they do more complicated returns and charge a minimum of **\$3,000!**.

I also have to **amend my 2018** tax return i **got a notice** regarding these late november. I will also like to have a quote on **what you will charge to help resolve the issue** with the IRS.

I hope to hear from you soon

Sincerely,
[REMOVED]



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Phishing Email – Example 2

Hello [REMOVED],

Thanks for your response, I am sorry for not getting back to you immediately. I have been out of my office and won't be back till the 27th of Jan. I am spending some time with my daughter. I hope you are still willing to help? Your pricing seems fair and within my budget. How do I sign up as a Tax client with your firm?

Below is a **ShareFile access** to my prior year tax return and **the letter I received**. Hopefully this gives you a better understanding of the complexity of my tax situation. I hope we can get started immediately. Would you need a retainer?

[REMOVED]

[REMOVED]



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IRS Impersonation Scams

- **Phone, e-mail, and texts impersonating Internal Revenue Service employees**
- **"As the holiday season and tax season approach, everyone should remember to take basic steps to protect themselves"**
 - **IRS Commissioner Chuck Rettig**



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Internal Revenue Service Does Not:

- **Call Demanding Payment and Making Threats of jail or lawsuits**
- **Demand payment via gift, debit, or iTunes cards**
- **Send unsolicited e-mails about refunds**
- **Request login credentials, Social Security Numbers or other sensitive information**
- **irs.gov/phishing**



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Other Government Agencies Investigate Scams

- **TIGTA investigates IRS impersonation Scams**
- **TIGTA phone number: 1-800-366-4484**
- **TIGTA web address: www.tigta.gov**
- **Federal Trade Commission: www.FTC.gov**



Recap

- **Recognize and avoid phishing scams**
- **Do not open links or attachments from suspicious e-mails**
- **Don't respond to unsolicited e-mails requesting your password or account information**
- **Use Multi-Factor authentication for all of your accounts**



Multi-Factor Authentication



Sign Up

If you don't have an IRS username,
go back and create an account.

< BACK

Log In

Already have a username? Welcome back!

Username

User@name

LOG IN >

[Forgot Username](#)

PTIN and FIRE users need a separate account in this system



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Log In

Verify that your Site Image and Site Phrase below are correct. If the Site Image and Site Phrase are not correct, please do not proceed.

Your Site Image:



Your Site Phrase:

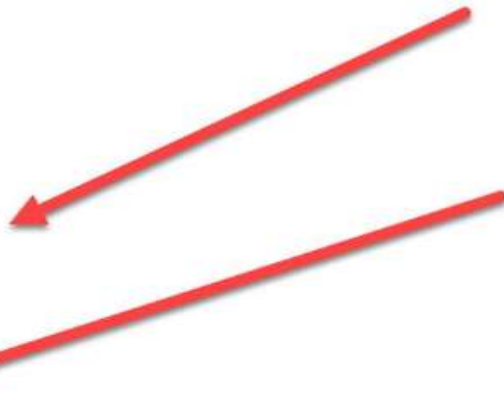
Maggie's Stuff

Password

[Forgot Password](#)

SUBMIT >

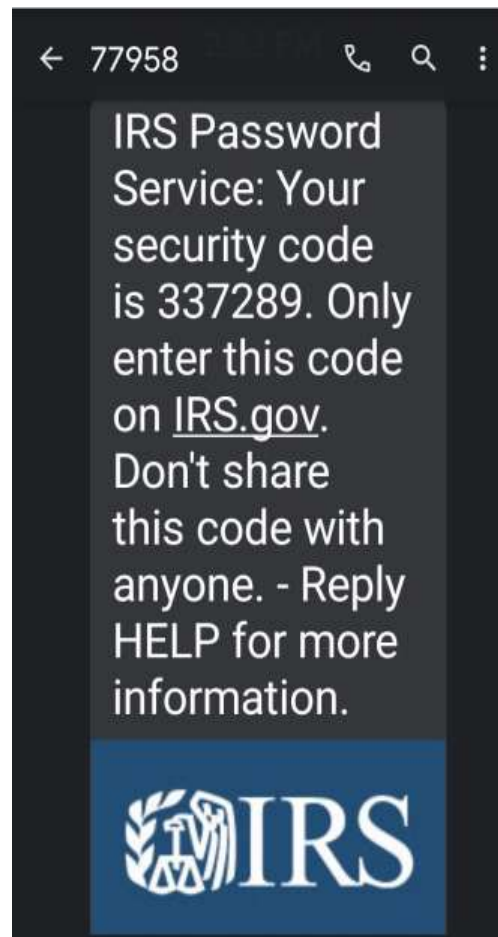
CANCEL





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We sent a security code to your phone

We sent a text message to your phone (ending in 5200). Please enter the code below.

6-digit security code

[Resend Security Code](#)

[No longer have access to this phone?](#)

CONTINUE >

[If you can't get a text message right now, you can get a security code via phone call.](#)

[Logout](#)



Practitioner Priority Service (PPS)

Practitioner Priority Service is a nationwide toll-free, account related service available to tax practitioners.

PPS Account Service is available to tax practitioners (individuals and businesses) who provide tax advice, prepare income taxes or act on the taxpayer's behalf and are calling in regard to an account related issue before the IRS.



Practitioner Priority Service (PPS)

PPS serves tax practitioners as the first point of contact for assistance regarding their clients' account related issues.

Improves overall consistency and quality of taxpayer service.

Available to tax practitioners with valid Form 2848, Form 8821, Form 8655 or other third party designee authorizations.



Practitioner Priority Service (PPS)

Hours of Service:

- 7:00 a.m. to 7:00 p.m. local time
- Alaska & Hawaii follow Pacific Time
- Puerto Rico practitioners- 8:00 a.m. to 8:00 p.m. local time.



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Practitioner Priority Service (PPS)

The following account related services are offered in all Accounts Management locations.

Resolving taxpayer account problems by:

- Locating and applying payments
- Explaining IRS communications (i.e., notices and letters)
- Providing general procedural guidance and timeframes



Practitioner Priority Service (PPS)

Resolving taxpayer account problems by:

- Making account adjustments
- Securing taxpayer income verification
- Providing transcripts of taxpayer accounts



Practitioner Priority Service (PPS)

Services that are Out of Scope for Accounts Management PPS Assistors

Tax Law questions

Accounts assigned to:

- Automated Collection Services (ACS) cases,
- Automated Under Reporter (AUR) cases,
- Correspondence Examination cases, or
- Cases assigned to Revenue Officer

Calls for specific employees



Practitioner Priority Service (PPS)

PPS voice options:

Option 1 - Tax Law questions

Option 2 - Individual Accounts not in collection or examination status

Option 3 - Business Accounts not in collection or examination status


Option 4 - Automated Collection System (ACS) status


Option 5 - Automated Under Reporter (AUR) status


Option 6 - Correspondence Examination



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[IRS Newswire](#) – Receive news releases as they are issued by the IRS National Media Relations Office in Washington, DC.

[Guidewire](#) – Receive notifications by e-mail when the IRS issues advance copies of tax guidance such as Regulations, Revenue Rulings, Revenue Procedures, Announcements, and Notices.

[Consejos Tributarios del IRS](#) – Boletín con consejos de impuestos en español.

[Alerts from Office of Professional Responsibility \(OPR\)](#) – Sign up to receive up-to-date email alerts from OPR, such as press releases, disciplinary actions, and more information.

[Tax Statistics](#) – Receive information about the most recent tax statistics.

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The IRS uses social media tools to share the latest information on tax changes, scam alerts, initiatives, products and services. Connect with the IRS through the following social media tools.

IRS2Go

Get quick access to IRS social media, sign up for helpful tax tips, check your tax refund status and make a payment — all with the [IRS2Go mobile app](#). IRS2Go is available in both English and Spanish for Android and iOS mobile devices.

YouTube

Tune in to the IRS YouTube channels. You can watch short, informative videos in English, American Sign Language and Spanish.

Twitter

IRS tweets include various announcements, scam alert and news for tax professionals. Available in English and Spanish.

Facebook

The IRS Facebook pages post useful information for general public in English and Spanish tax professionals.

LinkedIn

The IRS LinkedIn page posts important tax information, updates, and announcements from the IRS.

Instagram

The IRS Instagram account will share taxpayer-friendly information on a variety of topics to help people Get Ready for the tax season and to navigate tax law changes.

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- **Millions of people use IRS.gov to help file and pay taxes, get information about their accounts and get answers to tax questions.**



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